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5315-6 - SOURCE SELECTION POLICY

5315-600 Scope.

This supplement establishes Air Force source selection policy. It implements FAR Subpart 15.6, Source Selection, and fulfills the responsibilities of the Air Force agency head for source selection contained in FAR 15.604(a) and FAR 15.612(b).

5315-601 Definitions.

(a) Evaluation Notice (EN): Source Selection Evaluation Team (SSET) inquiries to offerors to better understand offeror proposals, or to notify offerors about deficient aspects of their proposals. ENs issued prior to competitive range determination are for the purpose of enhancing Government understanding of proposals without revision of those proposals. After the competitive range determination, ENs are also used to identify deficiencies and allow offerors to revise their proposals.

(b) Most Probable Price (MPP)/Most Probable Cost (MPC): The calculation by the Government which represents the most likely price or cost for each proposal.

(c) Objective Requirements Performance Level: Measurable, desirable capability or characteristic above the threshold. This is the capability or characteristic desired by the user and which the program manager would like to obtain. The objective should represent an operationally meaningful increment above the Threshold Requirements Performance Level.

(d) Proposal Analysis Report (PAR): A report prepared during source selection on Agency level actions that fully documents the results of the evaluation from receipt of proposals through source selection and, if a Source Selection Advisory Council (SSAC) is used, its comparative analysis of offerors' proposals.

(e) Performance Confidence Assessment: The Government's level of confidence in an offeror's ability to perform based on that offeror's past and present work record.

(f) Performance Confidence Assessment Group (PCAG): A group of experienced personnel assigned to accomplish the performance confidence assessment.

(g) Proposal Evaluation Report (PER): A report in simplified format which documents the essential aspects of the acquisition process from receipt of proposals through source selection.

(h) Proposal Risk: Identification of weaknesses and assessment of the risks associated with an offeror's proposed approach to meet requirements of the Request for Proposal (RFP). It summarizes risk derived from mission capability analysis.

(i) Requirement Documents: Includes all aspects of the RFP that address the needs of the Government to offerors. This includes Statements of Objectives, Technical Requirement Documents and System Requirement Documents.

(j) Requiring Office: The office (normally a program management or equivalent organization) responsible for translating user requirements into the requirements document which communicates those requirements to offerors within the RFP.

(k) Statement of Objectives (SOO): Identifies the broad, basic, top-level objectives of the acquisition and is provided in the RFP in lieu of a government-written statement of work.

(l) Source Selection Advisory Council (SSAC): A group of senior government personnel appointed by the SSA to provide counsel during the source selection process and, prepare a comparative analysis of the SSET's evaluation results, unless otherwise directed by the SSA.

(m) Source Selection Authority (SSA): Official designated to make the source selection decision.

(n) Source Selection Decision Document (SSDD): The document that reflects the SSA's integrated assessment and selection decision.

(o) Source Selection Evaluation Team (SSET): Group of government and, if needed, approved nongovernment personnel representing the various functional and technical disciplines relevant to the acquisition . The SSET evaluates proposals and reports its findings to the SSAC (if used) and the SSA.

(p) Threshold Performance Requirements Level: Measurable, minimum capability or characteristic. This is the minimum capability or characteristic required to satisfy the user's need. If a threshold is not achieved, that aspect of the offeror's proposal is deficient.

(q) Trade space: The range between threshold and objective performance requirements levels identified by the Government within which offerors may propose to perform in order to offer the government an optimum mix of contract characteristics and price/cost.

5315-602 Applicability.

(a) This supplement applies to all competitive negotiated acquisitions above the simplified acquisition threshold (SAT) conducted by Air Force contracting activities.

(b) Air Force source selection procedures contained in the Air Force Guide_____ shall be used to obtain "best value" for the government. Air Force source selection procedures are separated into three categories based upon the complexity and dollar value of the acquisition.

(1) Basic Source Selection Procedures. These procedures shall be used for less complex negotiated acquisitions which require few source selection discriminators. Basic procedures may be used for lowest price technically acceptable (LPTA) acquisitions regardless of dollar amount.

(2) Median Source Selection Procedures. These procedures shall be used for competitive negotiated acquisitions when basic source selection procedures are not appropriate; i.e., for more complex acquisitions where several source selection discriminators are necessary to satisfy user requirements.

(3) Agency Level Source Selection Procedures. These procedures shall be used when the SSA is at SAF/AQ or higher, unless SAF/AQ decides Median Source Selection Procedures are more appropriate

SOURCE SELECTION PROCEDURES APPLICABILITY

Basic Procedures **SAT to \leq \$10M**

Median Procedures* **>\$10M to \leq \$500M**

Agency Level Procedures **>\$500M**

***Except Information Technology, as follows: \$15/30M to < \$120M (see Attachment 1), all MAJCOMs**

Note: The AP/SAMP approving official for Median and Agency Level Procedures may use one of the above procedures, other than the one prescribed, if it is in the government's best interest to do so.

(c) Exceptions. The following types of acquisitions are exempt from this policy:

(1) Basic research, and acquisitions where Broad Agency Announcements (BAAs) and Program Research and Development Announcements (PRDAs) are used to solicit proposals and award contracts.

(2) Small Business Innovative Research (SBIR) acquisitions

(3) Architect-engineer services

5315.604 Responsibilities.

(a) The Source Selection Evaluation Team (SSET) Chairperson shall:

(1) Be responsible for the proper and efficient conduct of the entire source selection process;

(2) Ensure that personnel, other resources, and time assigned to the source selection reflect the complexity of the program;

(3) Be responsible for establishing effective liaison with the requiring activity to ensure requirements are effectively addressed in terms of the SOO and with threshold/objective language;

(4) Appoint members to the SSET, subject to approval of the SSA. Substitutions may be approved by the SSET Chair subsequent to SSP approval, and do not require an amendment to the SSP;

(5) Ensure that all persons receiving source selection information are instructed to comply with applicable standards of conduct and sign the Source Selection Information Briefing Certificate (see Attachment 2);

(6) Recommend approval of the SSP to the SSAC (if applicable) or to the SSA;

(7) Ensure members of the SSET are knowledgeable of their responsibilities before any proposal is reviewed, including details on how the evaluation is conducted;

(8) Review and approve issuance of ENs ;

(9) In conjunction with the contracting officer, prepare the Source Selection Decision Document (SSDD) for the SSA's signature, unless otherwise directed by the SSA;

(10) Participate in debriefings to offerors.

(b) The SSET shall:

(1) Conduct an in-depth review and evaluation of each proposal, and any subsequent revisions, against the approved factors, subfactors, elements, and other solicitation requirements;

(2) Prepare briefing slides which clearly summarize the evaluation results. Briefing slides should be suitable to serve as the official record of SSET proceedings in lieu of other more formal documentation. These briefing slides will be presented to the SSAC (if an SSAC is used). Otherwise, these briefing slides will be presented directly to the SSA;

(c) The SSAC Chairperson shall:

(1) Appoint SSAC members (other than Secretariat, HQ USAF, and joint service members) subject to SSA approval;

(2) Ensure that all SSAC members are knowledgeable of their responsibilities, involved from the beginning of the source selection process (e.g., acquisition strategy meeting), and instructed to comply with applicable standards of conduct and sign the Source Selection Information Briefing Certificate (see Attachment 2);

(3) Convene SSAC meetings to review the evaluation and findings of the SSET and to provide advice and/or analysis as requested by the SSA;

(4) Review SSP and recommend approval to the SSA.

(d) The SSAC shall:

(1) Review the SSP prior to SSA review/approval.

(2) Review the evaluation and findings of the SSET and provide advice and analysis as requested by the SSA;

3) Provide briefings and consultation at the request of the SSA;

(4) Normally, provide comparative analysis unless the SSA does not require it.

(5) Offer a recommended source selection decision for the SSA's consideration, if requested by the SSA.

(e) The PCAG shall:

(1) Conduct the performance confidence assessment, and keep the SSET Chairperson informed; and

(2) Brief the SSAC, if used, and the SSA.

(f) The contracting officer shall:

(1) Be responsible for all business aspects of the acquisition. As the business expert, the contracting officer is the principal advisor to the SSET on the conduct of the source selection.

(2) Prepare any required requests for delegation;

(3) Prepare the RFP, obtain any necessary reviews and approvals, and release the RFP;

(4) Issue notice of source selection to appropriate parties at time of final RFP issuance. Notice must state that all communications regarding the source selection must be through the contracting officer. For Agency Procedures make SAF/AQCS an addressee on this notice;

(5) Ensure required approvals are obtained, and solicitation notifications and contract clauses accomplished before non-government personnel are allowed to provide source selection support (see 5315.614-90(g) below);

(7) Request preaward surveys and audits, as appropriate;

(8) Make competitive range determination, if discussions are necessary;

(9) Prepare model contracts;

(10) Be the single point of contact and chair any discussions with contractors and ensure that the team membership remains consistent for all discussions with offerors;

(11) Request and receive any revisions to proposals and Best and Final Offers;

(12) Send DD-LA-(AR) 1279 report to SAF/LLP to announce contract award (see 5305.303-90);

(13) Award the contract to the successful offeror, distribute the contract, issue notice of contract award, and notify unsuccessful offerors;

(14) Promptly conduct a frank and open debriefing with any of the offerors at their request (see FAR Subpart 15.10);

(g) The SSA shall:

(1) Review and approve the SSP;

(2) Approve the SSET chairperson and, if a SSAC is used, appoint the SSAC chairperson, who shall be appointed at the same time, or shortly after;

(3) Ensure the SSET is knowledgeable of procedures for properly and efficiently conducting the source selection, as necessary;

(4) Ensure all involved in the source selection are knowledgeable of the consequences of unauthorized disclosure of source selection information (see 5315.614-90(j) below);

(5) Approve exclusion of any offeror from the competitive range;

(6) Make selection decision and document the supporting rationale in the Source Selection Decision Document (SSDD);

(7) Coordinate on any contracting officer decision to request more than one Best and Final Offer (BAFO);

(8) Approve the PCAG Chair, if a separate PCAG is used.

The SSA has, subject to law and applicable regulations, full responsibility and authority to select a source(s) for award and approve the award of the contract(s).

(h) SAF/AQCS shall:

(1) Serve as the Secretariat and HQ USAF action office for staffing all source selection actions when SAF/AQ is the SSA, such as delegations, SSAC chairperson nominations, and SSPs;

(2) Coordinate scheduling of source selection meetings and control access to briefings chaired by SAF/AQ; and

(3) Manage the coordination and approval of all source selection documents and facilitate resolution of contractual issues to ensure timely processing and approval within the Secretariat.

5315.605 Evaluation factors, subfactors, and elements.

(a) The hierarchical structure of source selection criteria for evaluation of proposals contains no more than three levels. Evaluation factors, subfactors and, if used, elements are the basis for assessing confidence in each offeror's ability, as expressed in its proposal, to meet the Government's needs, as stated in the solicitation. They are the uniform baseline against which each offeror's solution is compared to determine the level of confidence the Government has that the offeror will be able to actually perform the work which the offeror proposes to accomplish in its proposal. They establish the level an offeror's proposal must meet in order to be judged acceptable. It is Air Force policy to establish the absolute minimum number of factors and subfactors necessary for efficient and effective source selection. Factors, subfactors, and elements shall be limited to those that are real discriminators that measures the offeror's attributes in meeting the Government's needs. Evaluation factors, subfactors, and elements:

(1) Shall include only those specific program characteristics which are significant enough to have an impact on the source selection decision, such as those identified through program risk analysis;

(2) Shall be set forth in Section M of the RFP, Evaluation Factors for Award. In addition, the relative importance of all factors, subfactors, and elements shall be specified in Section M of the RFP;

(3) Shall be included in draft and final RFPs;

(4) May be quantitative, qualitative, or a combination of both;

(b) Affordability and Performance Confidence (when Performance Confidence Assessment is required by FAR dollar thresholds) factors are mandatory on all Air Force source selections.

(c) Air Force source selections shall be limited to no more than four evaluation factors, and five subfactors for mission capability. The following evaluation factors are standard for Median source selections: Mission Capability, Performance Confidence, Proposal Risk, and Affordability. (Subfactors shall not normally be used for performance confidence assessment, proposal risk, and affordability) Evaluation factors can be modified for either Basic or Agency level source selections, but subfactors should still not exceed five in number. :

EXAMPLE OF SOURCE SELECTION EVALUATION MATRIX

FACTORS

MISSION CAPABILITY				
SUBFACTOR 1	SUBFACTOR 2	SUBFACTOR 3	SUBFACTOR 4	SUBFACTOR 5
PERFORMANCE CONFIDENCE				
PROPOSAL RISK*				
AFFORDABILITY* (COST/PRICE)				

* Proposal risk and affordability are not color rated.

5315.608 Proposal evaluation.

(a) Mission capability subfactors shall be derived from requirements or requirements thresholds and objective requirements performance levels when used, and shall be assigned one of the following color evaluation ratings. These subfactor ratings shall not be rolled up to an overall color rating.

<u>Color</u>	<u>Rating</u>	<u>Definition</u>
Blue	Excellent	Has exceptional merit, and substantially exceeds specified performance or capability thresholds in a way very beneficial to the Air Force. Contains one or more outstanding major strengths.

Green	Satisfactory	Has overall merit and exceeds specified performance or capability requirements in a way beneficial to the Air Force. Contains one or more major strengths.
Yellow	Marginal	Meets specified performance or capability requirements necessary for minimal but acceptable contract performance. Contains few or no major strengths.
Red	Unsatisfactory	Fails to meet some or all specified performance or capability requirements necessary for minimal contract performance. Strengths, if any, are insufficient to achieve acceptable contract performance. Proposals with an unsatisfactory rating are not awardable.

(b) Performance Confidence Assessment. Past performance shall be evaluated in all Air Force source selections when required by FAR dollar thresholds (FAR 15.605(b)(1)(ii)). Past performance may be evaluated on source selections less than FAR thresholds at the contracting officer's discretion. When the integrated assessment of all aspects of the evaluation is accomplished, the confidence assessment of past performance shall be at least as important as mission capability or proposal risk.

(1) The main purpose of the past performance evaluation is to appropriately consider each offeror's demonstrated record of supplying products and services that meet users' needs including cost and schedule.

(2) The past performance evaluation should concentrate on evaluating the results of offeror's processes tailored to each acquisition, not the processes themselves. Examples include but are not limited to demonstrated results in such areas as: product performance, manufacturing performance, cost and schedule, quality, configuration management, subcontract management, software performance, and integration. Those acquisitions using Basic source selection procedures would normally focus on demonstrated results in such areas as product or service performance, timeliness, or schedule and price/cost. Evaluators should consider mitigating circumstances, such as process changes, which have resulted in improvements to previous performance problems. However, process changes should only be considered when objectively measurable improvement in performance has been demonstrated as a direct result of the changes.

(3) The recency and relevancy of the past performance information is critical in determining what contracts/programs should be evaluated and should be individually tailored for each acquisition. Contracts reflecting recent relevant performance will have greater impact in the performance confidence assessment than those which do not. Recency is normally performance occurring within the last three (3) to five (5) years. In determining relevancy, consideration should be given to such things as product similarity, product complexity, contract type, program phase, contract environment, and subcontractor interaction. The evaluation should be constrained to a few (normally not more than four) most recent and most relevant contracts/programs for a

comprehensive review. Early identification and use of past performance information to enable government evaluators to focus on this measure of the performance confidence assessment is critical. Offerors should be informed of the sources used to assess past performance and be given the opportunity to recommend other sources, if appropriate, which will provide recent relevant information.

(4) Past performance information may be obtained through CPARs, questionnaires tailored to the circumstances of the acquisition, through Defense Contract Management Command channels, through interviews with program managers and contracting officers or other sources known to the government. Use of data, like Software Capability Evaluation, from previous source selections or contractor capability assessments should be utilized if the data is recent and relevant.

(5) In performing a Performance Confidence Assessment each offeror shall be assigned one of the following color ratings:

<u>Color</u>	<u>Rating</u>	<u>Definition</u>
Blue	Great Confidence	The offeror has demonstrated performance on recent, relevant contracts which provides great confidence that the offeror will meet or exceed requirements in performing this effort. Little or no Government oversight or intervention is expected to be required in achieving the proposed level of performance.
Green	Confidence	The offeror has demonstrated performance on recent, relevant contracts which provides confidence that the offeror will meet requirements in performing this effort. It is expected that some Government oversight or intervention may be required to meet the contract requirements.
White	Unknown Confidence (Neutral)	The offeror has little or no recent, relevant contract performance
Yellow	Little Confidence	The offeror has demonstrated performance on recent, relevant contracts which provides little confidence that the offeror will meet requirements in performing this effort. It is expected that substantial Government oversight or intervention may be required to meet the contract requirements. Changes to the offeror's existing processes may be necessary in order to achieve contract requirements.

Red	No Confidence	The offeror has demonstrated performance on recent, relevant contracts which provides very little or no confidence that the offeror will meet requirements in performing this effort. It is expected that, irrespective of the degree of Government oversight or intervention, successful performance is doubtful.
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(c) Proposal Risk. Proposal risk relates to the identification of weaknesses and assessment of the risks associated with an offeror's proposed approach to meet the requirements of the RFP. It is directly attributable to the mission capability factor (or its equivalent for Agency source selections), and is an overall assessment driven by each of the subfactors within mission capability. Each offeror will be assigned one of the following proposal risk ratings:

(1) High Risk - Proposal weaknesses are likely to cause significant disruption of schedule, increased cost volatility, or degradation of performance even with special contractor emphasis and close government monitoring.

(2) Moderate Risk - Proposal weaknesses can potentially cause some disruption of schedule, increased cost volatility, or degradation of performance. However, special contractor emphasis and close government monitoring will probably be able to overcome difficulties.

(3) Low Risk - Proposal weaknesses have little potential to cause disruption of schedule, increased cost volatility, or degradation of performance. Normal contractor effort and normal government monitoring will probably be able to overcome difficulties.

(d) Affordability. The assessment of affordability will vary greatly among acquisitions, depending on the phase of the program, and type of product/services being acquired. The spectrum ranges from instant contract price or MPC only, to estimated life cycle costs projected through additional projected buys, or consideration of multiple facets bearing on ultimate costs/savings for the Government. Accordingly, every solicitation will contain a detailed description of the method(s), techniques, and procedures by which "affordability" will be assessed for that acquisition. This will include assumptions, formulas, and similar information which would enable offerors to make informed decisions on how best to propose. Whenever practicable when making affordability determinations, price analysis/evaluation shall be accomplished in lieu of cost analysis/evaluation. In addition, price/cost information requested from offerors shall be limited to that essential to conduct the evaluation. The contracting officer is solely responsible for determining the amount of price or cost information requested in the RFP, and for all aspects of the price or cost evaluation. However, it is the responsibility of the offeror to present the Government, within the format established by the RFP, with pricing information which is convincing with regard to the ability of the offeror to perform at that price (i.e., assumptions, basis of estimate, projected costs, etc.). If the offeror fails to accomplish this, the Government may have to rely upon the MPP or MPC. If required, the decision to do an MPP or MPC will depend on the resultant contract type; i.e., a MPC will be calculated for cost reimbursement-type contracts while a MPP will be calculated for fixed-price and fixed-price incentive type contracts. For cost reimbursable contracts, the MPC shall be

presented to the SSA in lieu of offeror proposed costs or prices for the SSA to perform the integrated assessment. For firm fixed-price and fixed-price incentive contracts, the MPP shall only be used for purposes of evaluating performance risk or contractor responsibility. The MPP shall not be used to adjust the offered price for comparison purposes. Due to the significance of MPP and MPC, the method to be used shall be described in the RFP to the maximum practicable extent.

To ensure the best possible evaluation, the entire government evaluation team should have access to price/cost information. This may also include, under proper circumstances, non-government advisors as required. On an exception basis, SSAs may limit or prohibit technical evaluator access to price/cost information. The SSP must document if technical evaluator access to price/cost information will be limited or prohibited. If limited access is to be imposed, the limitations must be described and included in the SSP and in a SSA determination. A copy of such determinations shall be provided to SAF/AQC.

(e) Offerors may be required to meet RFP requirements other than those identified as factors, subfactors, or elements to be eligible for award. When such conditions exist, the RFP must inform offerors of this condition for award.

5315.609 Competitive range.

(a) Summary rejection. After receipt of proposals, any proposal received which, on its face, fails in such a substantial manner to adequately address the requirements of the solicitation that it fails to make a good faith effort to respond to the solicitation, may be summarily rejected from further consideration without making a formal competitive range determination.

(b) The objective prior to the competitive range decision, is to understand offeror proposals and to obtain clarification if required. Ask only those questions necessary to make the competitive range determination. During the competitive range determination, it is our job to understand offeror proposals; not to improve them or to help make them better. It is the offeror's job to prepare the proposals so that they are clearly and easily understood by evaluators.

(c) Prior to the competitive range determination, evaluate the proposal as written, not what it might be if it were improved. No proposal changes or updates are permitted at this stage. Once evaluators understand what the offerors are proposing, they must determine compliance with all requirements of the RFP. Noncompliance with significant RFP requirements may result in an offeror being eliminated from the competitive range.

5315.610 Written and oral discussion.

In addition to clearly understanding offeror proposals, our role during discussions is to identify to offerors only those things in proposals that could clearly prevent award. Evaluators shall ask questions to clarify offeror intent where necessary, and where offeror intent is clearly understood, would only communicate to offerors information about deficiencies, and weaknesses so severe as to limit their award potential.

5315.614-90 Other Air Force Policy

(a) Openness. Early industry involvement and openness are the cornerstones of the Air Force's enhanced cooperative relationship with industry. Timely release of information to industry is essential to maximize the value of their inputs to the planning, requirements generation, and the acquisition processes. This involves engaging industry in drafting of solicitations through contracting business opportunity sites on the world wide web or other means. It will also include providing program budget information (either approved or tentative) unless deemed inappropriate by the SSA. In competitive acquisitions, particularly source selections, it is critical to balance the government's obligation to ensure fair and equal treatment and opportunities for all offerors, while protecting contractor proprietary, proposal and source selection information.

(b) Best value. In using the best value approach, the Government seeks to award to an offeror who gives us the greatest confidence that they will best meet our requirements affordably. This may result in an award being made to a higher rated, higher priced offeror where the decision is consistent with the evaluation factors and the SSA reasonably determines that the technical superiority and/or overall business approach of the higher priced offeror outweighs the cost difference. The SSA, using sound business judgment, bases the source selection decision on an integrated assessment of mission capability, proposal risk, and performance confidence assessment, and affordability.

(c) Trade Space. If thresholds and objectives are identified in the RFP, the Air Force must clearly communicate to offerors how a value analysis will be performed, comparing perceived benefit of proposed enhancements to the Government against associated cost/price. Generally, offerors proposals which exceed thresholds or meet objectives provide added value to the Government. However, the SSA must determine in accordance with the evaluation factors, subfactors and elements whether or not exceeding the objectives at an associated cost or price provides the best overall affordable benefit to the Government. Section M of the RFP should then be drafted to explicitly reflect the government's intent in this regard. Although each RFP must be tailored to reflect the specific requirements of a particular acquisition, Section M of the RFP should reflect one of the following three alternatives:

(1) Identify the required minimums (thresholds) but not any desirables (objectives) and inform offerors that any features or technical offerings that enhance the system will be considered in the best value determination.

(2) Identify both thresholds and objectives and explicitly state that the Air Force reserves the right to evaluate and give evaluation credit for the proposed features that are either in addition to the thresholds and objectives or that exceed the stated objectives.

(3) Identify both the thresholds and objectives and explicitly state that offerors will not be given credit for any objectives beyond those identified.

Note: When objectives are identified, preference shall be for Alternative (1) or (2).

(d) Organization. The organization structure for each category of source selection is described below. For all categories, the evaluation team may be augmented by other personnel as necessary. However, these augmentees are usually subject matter or technical experts for specific aspects of the source selection, and are not considered full-time members of the SSET.

(1) Basic Source Selection Procedures. The acquisition team will normally consist of one technical member and one contracting member. The Contracting Officer is the source selection authority. If additional team members are required, it must be approved by an official at least one level above the contracting officer.

(2) Median Source Selection Procedures. The source selection organization shall consist of the following: SSA, SSET, a PCAG, price/cost analyst(s) and contracting officer, normally not to exceed eight people. Additional team members or SSAC may be used if approved by the SAMP/AP approving official. The SSA is as stated in Attachment 1.

(3) Agency Level Source Selection Procedures. The source selection organization shall include the following: SSA, SSET (maximum of 10 people), PCAG, price/cost analyst(s), and contracting officer. An SSAC may be used if approved by the SAMP/AP approving official. The SSA is as stated in Attachment 1.

Note: A separate PCAG shall not be used in conjunction with Basic source selection procedures. A separate PCAG is optional for Median source selection procedures, but it is mandatory for Agency Level source selection procedures

(e) Dedicated personnel. All government personnel assigned as a source selection team member shall consider this duty as their primary responsibility. Their source selection assignment shall take precedence over all other work assignments. Supervisors are responsible for ensuring that other work assignments do not conflict with subordinates' source selection duties. Key members of the source selection team such as the SSET Chairperson, the PCAG Chief, and if possible, the contracting officer, must have source selection experience and be designated early.

(f) Federally Funded Research and Development Centers (FFRDC). Because of its unique relationship with its Government sponsor of providing special long term technical capability an FFRDC employee may serve as a member of a SSET. However an FFRDC employee may not serve as a chairperson of a SSET, PGAG, SSAC, or as an SSA.

(g) Advisors (Government and Contractors) Advisors may be used as necessary to assist in the source selection evaluation. These advisors may be Government personnel or contractor personnel. Although advisors may assist in the evaluation and provide input regarding the strengths and weaknesses in proposals, advisors shall not determine ratings or rankings of offerors' proposals. If contractor personnel are used as advisors the following applies:

(1) Access to offeror proposals must be restricted to only those portions for which the advisor's expertise is required in the evaluation. (e.g., software support contractor only reviews software hours proposed).

(2) The contracting officer must ensure that the necessary approval has been obtained in accordance with FAR Part 37.2.

(3) The solicitation (RFP) must provide notice to prospective offerors that contractor personnel will be used in evaluating the proposals.

(4) Appropriate Organizational Conflict of Interest (OCI) provisions must be included under the contract through which the advisors are provided.

(5) If any of the above conditions are not met, or competing offerors object to the release of their proposal information to support contractors, the non-government personnel shall not be permitted to participate in the source selection or have any access to any source selection data, whatsoever.

(h) Required source selection documents.

(1) Source Selection Plan (SSP). The SSP is a key document in conducting the source selection. It should include applicable Program Management Directive (PMD) or other applicable guidance or direction and contain the elements described below to ensure timely staff review and SSA approval. The requiring office shall prepare a SSP for all source selections conducted under this policy.

(i) The SSP must be submitted sufficiently in advance of the planned acquisition action to permit review and approval by the SSA and early establishment of the source selection organization. In order to accelerate the acquisition, the SSP should be prepared and approved in conjunction with the SAMP or ASP. Briefing charts may be used to document the SSP. If SAF/AQ or higher is the SSA, the SSP shall be sent to SAF/AQCS for coordination and approval by SAF/AQ;

(ii) When changes in acquisition strategy require a revision to the SSP, the requiring office will send the proposed revision through source selection channels to the SSA, which may be accomplished through briefing charts used and approved in the acquisition strategy meeting;

(iii) The SSP shall include the following sections or references to other documents containing this information if it is addressed in other official documents. (whenever possible, refer to and attach supporting documents rather repeating the information in the SSP):

(a) ACQUISITION STRATEGY. The SSP will include a summary of the acquisition strategy, including type(s) of contract(s) proposed, the incentives contemplated, milestone demonstrations intended, special contract clauses, etc. The SSP acquisition strategy must reflect the strategy developed in the AP/SAMP.

(b) SOURCE SELECTION ORGANIZATION. Describe the proposed organization (see "Organization" in paragraph (d) above). List recommended key

members by name, position title, or by functional area. The plan must identify other Government organizations that will participate in the source selection.

(c) **PROPOSED PRESOLICITATION ACTIVITIES.** Describe the activities leading up to the release of the solicitation such as market research, draft solicitations, and synopsis. For the market research, discuss how it was used to achieve competition, including a discussion of screening criteria, if applicable.

(d) **EVALUATION PROCEDURES.** Identify which evaluation procedures will be used; i.e., Basic, Median, or Agency Level procedures.

(e) **EVALUATION FACTORS, SUBFACTORS and ELEMENTS.** Describe the evaluation factors, subfactors, and elements and their relative order of importance. The methodology for calculating MPP or MPC shall be described. (Attach RFP Sections L and M).

(f) **SCHEDULE OF EVENTS.** Identify and establish the schedule for significant source selection activities in sufficient detail to allow the reviewing authorities to assess the practicality of the schedule.

(g) **NON-GOVERNMENT PERSONNEL.** The SSP shall address the use of non-government personnel.

(2) **Proposal Evaluation Report (PER).** The objective of this report is to be simple and concise and to utilize existing documentation, e.g., evaluator worksheets, to the maximum extent possible. The PER is required for Basic and optional for Median source selections. The PER documents the overall mission capability, affordability, proposal risk, and performance confidence assessment. Section one of the report details the evaluation by offeror and should be used for debriefings. Section two is the comparative analysis of offerors. Section three is the source selection decision document. For those offerors excluded from the competitive range, this section will include the rationale for the competitive range determination. Separate price/cost and technical reports are not required.

(3) **Proposal Analysis Report (PAR).** The objective of this report is to provide the comparative analysis of competitive offerors, documenting the integrated assessment of the mission capability evaluation, the performance confidence assessment, proposal risk assessment and affordability of the proposals relative to factors, subfactors and elements and to each other. It is the result of the SSET evaluation and SSAC analysis. The PAR is required for Agency and optional for Median source selections. When used for Median source selections it requires SSA approval.

(4) **Briefing charts for the SSA decision meeting.** Charts presented to the SSA must include the mission capability, performance confidence assessment, proposal risk rating, and affordability of each offeror's proposal in the competitive range. Only the final ratings are required to be shown (changes from the initial evaluation briefing, if conducted, to the source selection decision briefing should not be depicted). In addition, sufficiently detailed narrative descriptions of

each offerors' strengths and weaknesses must be included, and written in a manner that allows the briefing to be a stand-alone depiction of the final evaluation, without ambiguity or need for additional explanation. This is necessary to ensure that anyone reviewing these briefing charts, including successful and unsuccessful offerors, are able to clearly understand the final evaluation results which led to the SSA's decision.

(5) Source Selection Decision Document (SSDD). A SSDD shall be prepared for all Air Force source selections and must reflect the SSA's integrated assessment and decision. The SSDD should be fully documented and should also reflect the complexity and dollar value of the source selection environment. It should include rationale for any business judgments and tradeoffs, including benefits associated with additional cost, comparing aspects of the highest rated proposals which led to the SSA decision, and providing sufficient information to clearly identify specific tradeoffs made by the SSA to arrive at the decision. The SSDD is fully releasable to the General Accounting Office and others authorized to receive proprietary and source selection information. However, proprietary and source selection information must be redacted when releasing a copy of the SSDD to offerors or to anyone not authorized to receive proprietary and source selection information. The need to redact such information is not a sufficient reason to refrain from preparing a properly written SSDD.

(i) Debriefing. Debriefings will be conducted at the request of the offeror (whether successful or unsuccessful) promptly and frankly (see FAR 15.10). Offerors shall be provided the same final evaluation briefing charts on its proposal that were presented to the SSA, including the narrative description of strengths and weaknesses of that offerors proposal. In addition, for unsuccessful offerors, the same final evaluation briefing charts that were presented to the SSA on the successful offeror's ratings shall be provided without the narrative description of the successful offerors' strengths and weaknesses (unless the successful offeror agrees to release this information). Although overall ranking of offerors is not required in Air Force source selections, if such a ranking is done, the offeror being debriefed must be informed of the ranking of its proposal. Questions may be asked by the offeror, and responded to by the government; however, the debriefing is not a forum for debate regarding the subjective judgment of the SSA. If the government team participating in the debriefing is uncertain about a response to an offeror's question, or determines the question may be inappropriate (e.g., the response would reveal proprietary or classified information to which the offeror is not permitted access), the offeror should be so informed, and provided with a response, if appropriate, as soon as possible after the debriefing. Whenever possible, the SSA should be participate in the debriefing and the debriefing held at the offeror's facility. Offerors requesting to provide the Air Force with a debriefing on their proposals may be permitted to do so.

(j) Protecting source selection records.

(1) In order to maintain the effectiveness and integrity of the source selection process, information related to the source selection and offeror proposal information must be handled with the utmost discretion to avoid any compromise. "Source selection information" and "bid and proposal information" are defined in FAR 3.104-3. Source selection information shall be marked in accordance with FAR 3.104-5(c).

(2) Disclosure of proposal and source selection information shall only be in accordance with FAR 3.104-5(a). After decision, the contracting officer may determine that it is appropriate to delete source selection information markings from some documentation, particularly if it is information that is provided to offerors during debriefings.

(k) Foreign Military Sales (FMS). When the Air Force conducts a major source selection for a FMS customer or in accordance with a cooperative agreement with a foreign government, the policy of this supplement will be followed unless a deviation is approved in accordance with 5315.614-90(l).

(1) The FMS customer shall not participate in the source selection process. Subject to approval by the SSA, representatives of the customer country may be called upon by the SSET or SSAC to clarify technical questions during evaluation of contractor proposals. The cost data or any part of a contractor's cost proposal shall not be released to any representative of the FMS customer. Representatives of the FMS customer shall not participate in contract negotiations.

(2) Source selection decisions in international cooperative projects are the responsibility of the host nation in accordance with the terms of the cooperative agreement. All participating nations may be represented on the SSET and SSAC, but the SSA shall, after considering the advice of the SSET and SSAC, make the source selection decision.

(l) Deviations. Deviations to this supplement may be granted only by ASAF(A) or PDASAF(A&M), unless this supplement is used at the discretion of the SSA (see Note 1 of the Applicability Chart), in which case the SSA may approve the deviation.

(1) When the SSA is the ASAF(A) or PDASAF(A&M), a request for deviation may be included in the SSP and must specifically identify the deviation with adequate rationale. When submitted as part of the SSP, approval of the SSP shall constitute approval of the requested deviation(s) unless otherwise noted by the SSA.

(2) Other requests for deviations shall be submitted in writing through appropriate channels to SAF/AQCS for processing.

Attachment 1

AFMC Source Selection Authority (SSA) Thresholds

PEO and DAC Programs (non Information Technology)// Other Contracting

<u>Threshold</u>	<u>SSA (Delegable)</u>	<u>SSP Review</u>
\$5M to < \$10M	Contracting Officer	Technical Team Member
≥ \$10M to < \$50M	Single Manager*	BOCO/SLCO
≥ \$50M to < \$500M	PEO or DAC//Center CC	SCCO
≥ \$500M	ASAF(A)	SSAC

MAIS Programs and non-MAIS Information Technology Acquisitions

<u>Threshold</u>	<u>SSA (Delegable)</u>	<u>SSP Review</u>
\$5M to < \$15/30M**	Single Manager*	BOCO/SLCO
≥ \$15/30M** to < \$120M and non-MAIS	PEO or DAC//Center CC	SCCO
≥ \$120M or MAIS	PDASAF(A&M)	SSAC

* Single Manager (SM) includes System Program Director, Product Group Manager (PGM), Materiel Group Manager (MGM), and Lab Commander.

** \$15/\$30M means \$15M or more in any FY or \$30M or more for all program years.

Other MAJCOMs, FOAs, DRUs Source Selection Authority Thresholds (Other Contracting)

<u>Threshold</u>	<u>SSA (Delegable)</u>	<u>SSP Review</u>
< \$10M	Contracting Officer	Technical Team Member
≥ \$10M to < \$500M	Commanders*	Per Command Guidance
≥ \$500M	ASAF(A)	SSAC

MAIS Programs and non-MAIS Information Technology Acquisitions

<u>Threshold</u>	<u>SSA (Delegable)</u>	<u>SSP Review</u>
< \$10M	Contracting Officer	Technical Team Member
≥ \$10M to < \$120M and non-MAIS	Commanders*	Per Command Guidance
≥ \$120M or MAIS	PDASAF(A&M)	SSAC

* Commanders of MAJCOMs, FOAs and DRUs

TABLE B NOTE: If an acquisition is designated a PEO Program, the PEO is the SSA for thresholds below ASAF(A) (delegable).

**ATTACHMENT 2, SOURCE SELECTION INFORMATION BRIEFING
& DEBRIEFING CERTIFICATES**

Source Selection Information Briefing Certificate

Name: _____ **Grade:** _____ **Job Title:** _____

Organization: _____ **Source Selection:** _____ **Date:** _____

Briefing Acknowledgment

1. I acknowledge I have been assigned to the source selection indicated above. I am aware that unauthorized disclosure of source selection or proprietary information could damage the integrity of this procurement and that the transmission or revelation of such information to unauthorized persons could subject me to prosecution under the Procurement Integrity Laws or under other applicable laws.
2. I do solemnly swear or affirm that I will not divulge, publish, or reveal by word, conduct, or any other means, such information or knowledge, except as necessary to do so in the performance of my official duties related to this source selection and in accordance with the laws of the United States, unless specifically authorized in writing in each and every case by a duly authorized representative of the United States Government. I take this obligation freely, without any mental reservation or purpose of evasion and in the absence of duress.
3. I acknowledge that the information I receive will be given only to persons specifically granted access to the source selection information and may not be further divulged without specific prior written approval from an authorized individual.
4. If, at any time during the source selection process, my participation might result in a real, apparent, possible, or potential conflict of interest, I will immediately report the circumstances to the Source Selection Authority.
5. All personnel are requested to check the applicable block:
 - ☐ I have submitted a current SF Form 450, Executive Branch Personnel Confidential Financial Disclosure Report, or SF 278, Executive Personnel Financial Disclosure Report, as required by DODD 5500.7.
 - ☐ I will submit a SF Form 450 or SF 278 to the SSEB chairperson within ten work days from the date of this certification.
 - ☐ I am not required to submit a SF Form 450 or SF 278.

SIGNATURE: _____

DATE: _____

Debriefing Certificate

I have been debriefed orally by _____ as to my obligation to protect all information to which I have access during this source selection. I no longer have any material pertinent to this source selection in my possession except material that I have been authorized in writing to retain by the SSA. I will not discuss, communicate, transmit, or release any information orally, in writing, or by any other means to anyone after this date unless specifically authorized to do so by a duly authorized representative of the United States government.

Signature of Person Debriefed

Date of Debriefing

Signature of Person Debriefed

Date of Debriefing



SOURCE SELECTION INFORMATION

**THIS IS A COVER SHEET
DO NOT DEFACE**

**ONLY INDIVIDUALS WHO HAVE
COMPLETED A SOURCE SELECTION
INFORMATION BRIEFING CERTIFICATE
FOR THE SOURCE SELECTION
ASSOCIATED WITH THE ATTACHED
DOCUMENT(S) MAY HAVE ACCESS TO THE
SOURCE SELECTION INFORMATION
CONTAINED IN THE ATTACHED
DOCUMENT(S).**

RETURN TO:

U.S. GOVERNMENT INFORMATION ATTACHED - SAFEGUARD AT ALL TIMES

SOURCE SELECTION INFORMATION

FOR OFFICIAL USE ONLY